

Training Requirements Assessment

Learning Services

Accelerating User Adoption

The Open Text Training Requirements Assessment (TRA) assesses the various aspects of your implementation to identify learning needs and criteria and recommend training specific to your users' needs. The Learning needs assessment is a crucial stage in the educational and adoption process.

TRA Benefits

The Training Requirements Assessment will accelerate:

- **Improved adoption.** By providing executive sponsors, managers, users and administrators with the business context and benefits of the application (strategic) and clear learning paths beyond the initial setup and deployment to business units (tactical). Improved adoption increases ROI and allows the Customer to take advantage of the *process* and *business* gains offered by our products.
- **Less time (and costs) to train and to prepare training.** Acquiring specific and detailed learning objectives for each of the learning community groups reduces the time to develop and deliver training.
- **Reduce reliance on help desk support staff.** With an improved level of knowledge in the day-to-day use of the tools, a reduction in technical support, while encouraging the accurate use of our software can be anticipated.
- **Ensure a healthy, secure ECM environment** by providing your knowledge managers, trainers and system administrators with the right training to use your new tools effectively.
- **Improved quality and value of information.** Users that understand the value of the system (educated in both the benefits and the 'how to') will store and extend information that is valuable.

TRA Approach

The Open Text approach to determine *relevant* and *just-in-time* learning includes the following analysis points and recommendations:

- **Business Need:** An overview of the change in practice related to the implementation is discussed to determine if instruction is required. The scope of the new functional technology to be deployed is reviewed along with the deployment objectives and roll out schedule.
- **Learning Community:** Based on the interviews conducted, the needs of the community by position and groups are assessed.
- **Gap Analysis and Learning Objectives by User Roles:** Following a gap analysis, a detailed list of learning objectives are defined and mapped to the various user roles to determine the training content analysis.
- **Training Delivery Methods:** Various instructional tools and training delivery methods are discussed and assessed based on your organization's culture, previous experience, learning objectives and audience experience.
- **Training Plan:** Learning recommendations are prepared including recommended courses with descriptions, estimated duration, delivery method(s) and rollout schedule recommendations.
- **Content Analysis and Customization Efforts:** Learning recommendations are mapped to existing Open Text materials. If existing course materials requires customization, or new course material is required, the estimated level of effort to develop the material and deliver the course(s) will be provided.
- **Conclusion and Go Forward Plan** includes considerations for you to implement your organization's training plan.



TRA Development Stages

During the Training Requirements Assessment Engagement, the following tasks are performed:

Stage I: Preliminary Tasks

- The Open Text Education team will review the business goals and objectives for this engagement. A schedule of activities will be prepared.

Stage II: Data Gathering & Analysis

Meet with Customer's Project Implementation Team to:

- Determine lines of business and business processes influenced by new implementation
- Review the scope of the functional technologies including custom applications intended for deployment with respect to training needs
- Review existing learning tools and organization culture considerations
- Discuss policies or behavioral changes to incorporate in training plan
- Identify groups for consultative interviews

A series of consultative interviews are conducted with the learning community to:

- Identify and validate the audience roles and responsibilities
- Determine the day-to-day responsibilities of individual users and groups of users
- Define the learning needs of the community by roles and groups and the audience experience/skill level
- Consider changes to existing practices and policies, and behavioral change management considerations
- Discuss existing training methods and train-the-trainer possibilities
- Assess existing Open Text course structure and support materials for re-usability

Stage III: Conclusions and Recommendations

- Develop Training Plan with recommendations based on analysis
- Compose initial draft of Training Requirements Assessment for discussion with Customer

Stage IV: Reporting

- Review and revise the Training Requirements Assessment if required
- Conduct meeting with Customer to discuss details of the report and go-forward plan

How to Begin

For more information about this or any other Open Text service engagement, please contact your account representative or training@opentext.com to be connected with your consulting services representative.



TRA Deliverables:

The Training Requirements Assessment Report includes:

- Training Analysis Data
- Identified Gaps
- Required Learning Objectives
- Recommended Syllabi
- Training Plan



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